

WHAT YOU NEED FOR YOUR DISABILITY INTERVIEW

You should have as much of the following information as possible for your interview. Use this checklist to keep track of the information you gather. You can use this envelope to keep your information together.

Keep your appointment. Do not delay filing even if you do not have all of the information. We will help you get any missing information.

- ☐ An original or certified copy of your **birth certificate**. If you were born in another country, we need **proof of U.S. citizenship** or legal residency.
- ☐ If you were in the military service, the original or a certified copy of your **military discharge papers** (Form DD 214) for all periods of active duty.
- ☐ Your **W-2 Form** from last year, or if you were self-employed, your federal tax return (IRS 1040 and Schedules C and SE).
- ☐ **Workers compensation information**, including date of injury, claim number and payment amount.
- ☐ **Social Security Numbers** of your spouse and children.
- ☐ Your **checking or savings account** number if you have one.
- ☐ **Name, address and phone number of a person** who can get in touch with you if necessary.
- ☐ **Medical and job information:**
 - ☐ Names, addresses and phone numbers of all doctors and other treating sources.
 - ☐ Patient ID number of each treating source.
 - ☐ Dates seen by each treating source.
 - ☐ Names of medicines you are taking.
 - ☐ Medical records in your possession.
 - ☐ Kind of jobs and dates you worked in the 15 years before becoming disabled.

See enclosed green worksheet to help gather this information.